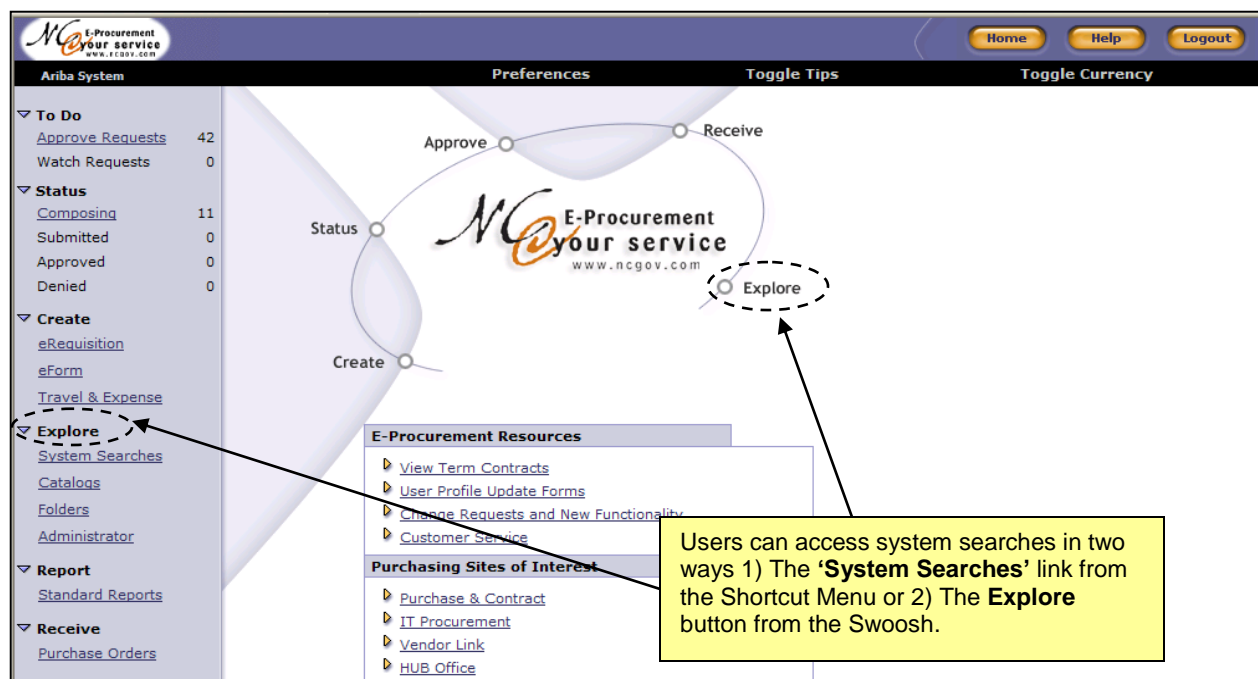


Conducting System Searches

The system search functionality gives users the ability to search NC E-Procurement @ Your Service to locate and view eRequisitions, purchase orders, and receipt information (NCAS only). The system search functionality is a quick and easy way to locate needed information. System searching offers a range of search criteria so users can conduct a search with minimal information. For example, users can search by requestor, commodity code, creation date, and/or supplier name.

For similar or frequent searches, use the Saved System Search functionality. This allows users to directly access a former system search quickly without entering specific search criteria again.



1. Click the '**System Searches**' link in the Shortcut Menu.

Create Search

Search Name:

Category:

| Filter Name | Value |
|---------------------------------|---|
| Account: | (select a value) [select] |
| Account Code: | <input type="text"/> |
| Center: | (select a value) [select] |
| Commodity Code (any line item): | (select a value) [select] |
| Company: | (select a value) [select] |
| Created On Behalf Of: | Nchelpdesk01 [select] |
| Date Created: | No Choice |
| Entity: | (select a value) [select] |
| eRequisition ID: | <input type="text"/> |
| Legacy Document Id: | <input type="text"/> |
| Status: | No Choice |
| Supplier (any line item): | (select a value) [select] |
| Total Cost: | <input type="text"/> To: <input type="text"/> |

[Search](#) [Add/Remove Search Filters](#)

2. Enter the necessary search criteria in the appropriate fields to conduct the system search.

Note: Users with the appropriate permissions can change the '**Category**' listed at the top of the '**Create Search**' page. Available categories include: Direct Order, eRequisition, ERP Order, Purchase Order, Receipt, and Receipt Tracker. Select the appropriate category to return the desired transaction type.

Note: The '**Created On Behalf Of**' field will automatically default to the user currently logged into NC E-Procurement Service. Depending on roles/permissions, some users may be able to change and/or remove the '**Created On Behalf Of**' value to perform a broader search across their entity. (The role required to modify the '**Created On Behalf Of**' value is the Inquirer role).

Note: The '**Entity**' field will automatically default to the entity associated with the current user. This value can only be changed for users with cross-entity reporting permissions. All other users can only search for transactions associated with their entity.

Users can add or remove search filters, as necessary, by clicking the '**Add/Remove Search Filters**' link.

Select Filters

Select filters to use in the search, to limit and focus the search results. Some search filters may not be applicable to your agency. [How To](#)

| | |
|--|--|
| <input type="checkbox"/> Account | <input type="checkbox"/> Entity |
| <input type="checkbox"/> Account Code | <input checked="" type="checkbox"/> eRequisition ID |
| <input type="checkbox"/> Add approver to approval flow | <input type="checkbox"/> eRequisition Title |
| <input type="checkbox"/> Approved By | <input checked="" type="checkbox"/> Federal Award Number (any line item) |
| <input checked="" type="checkbox"/> Bid Number (any line item) | <input checked="" type="checkbox"/> Government Grant ID (any line item) |
| <input type="checkbox"/> Center | <input checked="" type="checkbox"/> Grant ID (any line item) |
| <input type="checkbox"/> Commodity Code (any line item) | <input type="checkbox"/> Legacy Document Id |
| <input type="checkbox"/> Company | <input type="checkbox"/> Need-by Date (any line item) |
| <input checked="" type="checkbox"/> Created On Behalf Of | <input type="checkbox"/> Non-Catalog Item (any line item) |
| <input type="checkbox"/> Date Approved | <input type="checkbox"/> Order ID (any line item) |
| <input type="checkbox"/> Date Created | <input type="checkbox"/> Preparer |
| <input type="checkbox"/> Date Ordered | <input type="checkbox"/> Price (any line item) |
| <input type="checkbox"/> Date Received | <input type="checkbox"/> Status |
| <input type="checkbox"/> Date Submitted | <input type="checkbox"/> Supplier (any line item) |
| <input type="checkbox"/> Delay Purchase Until | <input type="checkbox"/> Total Cost |
| <input type="checkbox"/> Description (any line item) | |

OK **Cancel**

- Users can add or remove search filters by placing/removing the checkmark in the checkbox beside the desired field.
- Click 'OK' when complete.

Create Search

Specify a search name, category, and criteria. If a filter is associated with line item information, the search retrieves every document where any line item matches the specified value. [How To](#)

Search Name:

Category:

| Filter Name | Value |
|---------------------------------------|--------------------------------------|
| Bid Number (any line item): | (select a value) [select] |
| Created On Behalf Of: | Requester [select] |
| Entity: | (select a value) [select] |
| eRequisition ID: | <input type="text"/> |
| Federal Award Number (any line item): | (select a value) [select] |
| Government Grant ID (any line item): | <input type="text"/> |
| Grant ID (any line item): | (select a value) [select] |

Search [Add/Remove Search Filters](#)

Note: Only the selected fields now appear on the 'Create Search' page.

- After adding the appropriate information, click the 'Search' button to complete the system search.

Note: Use the 'Created On Behalf Of' search filter to increase the speed at which the search results are returned. This field is especially important when searching by 'Government Grant ID'.

Review Search Results

Search Name: All Entity 42 Requisitions
Search Category: eRequisition
Search Filters: Entity = 42

[Save Search](#) [Refine Search](#)

Items that meet your search criteria: 154

| Type | Date Created | Title | Status | ID | Total |
|--------------------------|------------------|--|-----------|------------------------------|-------------|
| <input type="checkbox"/> | Wed, 3 Aug, 2005 | Untitled eRequisition | Composing | PRDEV1000382 | \$0.00USD |
| <input type="checkbox"/> | Wed, 3 Aug, 2005 | Untitled eRequisition | Composing | PRDEV1000387 | \$0.00USD |
| <input type="checkbox"/> | Wed, 3 Aug, 2005 | Untitled eRequisition | Composing | PRDEV1000391 | \$746.86USD |
| <input type="checkbox"/> | Wed, 3 Aug, 2005 | PGL7&17-8/3-1654 FailedRequisition | Pending | PRDEV1000392 | \$746.86USD |
| <input type="checkbox"/> | Wed, 3 Aug, 2005 | test of the catalog loading | Composing | PRDEV1000394 | \$746.86USD |
| <input type="checkbox"/> | Wed, 3 Aug, 2005 | PurchaseOrderFail | Pending | PRDEV1000397 | \$2.14USD |
| <input type="checkbox"/> | Wed, 3 Aug, 2005 | Test of the integration. | Submitted | PRDEV1000398 | \$0.00USD |

[Copy](#) [Delete](#)

6. To **save** this search for future use, click the **'Save Search'** button.

Save Search

Search Name:

Search Category: eRequisition

Search Filters: Entity = 42

[OK](#) [Cancel](#)

7. Enter a search name in the **'Search Name'** field.

8. Click **'OK'**.

System Searches

Create a [New Search](#)

☐ Search Name

☐ All Entity 42 Requisitions

☐ Example Saved Search

[Delete](#)

[Search](#) [Search](#)

9. All saved searches will appear on the initial System Searches page.